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SUGAR REPORTS

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MARKET REVIEW

The quoted wholesale price of refined sugar at New York remains at 8.80 cents per pound. In the south and Chicago-west territories, where deliveries of cane and beet sugar were made through May 31 at 8.30 and 8.10 cents, respectively, the quoted prices are 8.65 and 8.45 cents.

With the prospect of warmer weather after an unusually cool spring and with industrial users' inventories probably at a minimum, a seasonal increase in demand appears to have begun. Deliveries of sugar by primary distributors, which for the first four months of the year were 154 thousand tons behind those of last year were, by June 5, only 73 thousand tons behind. Deliveries during the weeks ended May 15 and 22 were slightly higher than during the corresponding weeks of 1953; during the weeks ended May 29 and June 5, 1954, deliveries totaled 172 and 188 thousand tons, respectively, compared to 146 and 154 thousand tons during the same weeks a year ago.

Almost the entire increase of 93 thousand tons in deliveries during these four weeks over the same four weeks of 1953 was in deliveries of beet sugar. Beet sugar processors' deliveries through May 31 were about 21 percent of total deliveries for U. S. consumption during that period. Deliveries by this group constituted 19 percent of the total for the same period of 1953 and averaged 20 percent for the first five months during 1949-53. Of the 1,752 thousand tons of beet sugar marketed during the calendar year 1953, 34 percent was marketed during January-May; 37 percent of the average 1949-53 annual marketings of 1,656 thousand tons was marketed during the first five months. January-May 1954 marketings by the beet sugar processors amounted to 35 percent of their quota of 1,800 thousand tons. These marketings were in addition to beet sugar which was marketed in 1953 in the form of constructive deliveries and which has moved into consumption channels this year. From these comparisons it is apparent that beet sugar deliveries are proceeding at a rate nearly commensurate with the beet sugar quota. Anticipation by refiners of increased demand is reflected in the recent modest rise in the price of raw sugar. The price of raw sugar, duty paid at New York, which averaged 6.10 cents per pound for the month of May dropped to 6 cents on May 28 but after that date gradually increased, averaging 6.13 cents for the first ten market days of June, despite the fact that refiners' stocks are currently at a comfortable level, amounting to 741 thousand tons on June 5, as compared to 688 thousand tons on May 31, 1953, and the fact that cargoes of Philippine raws in nearby arrival positions have been pressing on the market.

There has been little change recently in the world market price of sugar which averaged 3.32 cents per pound for May. The average price for May 1953 was 3.65 cents. Although there are scattered reports that some commodities are being bought in increasing quantities in the world market for stockpiling by foreign purchasers, this has not been apparent so far as sugar is concerned. Trade

sources estimate sales of Cuban sugar in the world market as of May 31 at 795 thousand short tons as compared to 1,815 thousand during January-May 1953. Actual exports of world market sugar from Cuba through May 15 were 470 thousand tons this year and 1,155 thousand tons last year.

THE CURRENT WORLD FREE MARKET SITUATION

The United States obtains its sugar from domestic and foreign areas under the quota system of the Sugar Act. Although this system tends to insulate us to a large extent from the sometimes violent swings of the world free market, we are by no means unaffected by developments in that market. A stabilized world free market for sugar is highly conducive to effective administration of the Sugar Act.

The world free market represents about 30 percent of total international trade in sugar and about 10 to 15 percent of total world consumption of centrifugal sugar. As the residual source of supply, the price of this free market portion of sugar moving in international trade is much more sensitive to swings in supply and demand than that portion which is accorded preferential treatment.

A large portion of the world free market supply comes from Cuba. That country is also our principal foreign supplier of sugar. Since sugar destined for the United States normally sells at a premium, Cuba will satisfy our demands for sugar in preference to her world free market customers. Thus, the world free market performs for us the function of a reserve. Within reasonable limits, Cuban sugar supplies destined for the world free market could readily be earmarked for export to the United States if our demand required such transfer.

Strong American demand for sugar tends to strengthen the world free market but conditions in other parts of the world are of equal or greater importance. The International Sugar Agreement of 1953 seeks to stabilize the free market portion of international trade in sugar. (For an explanation of the Agreement see Sugar Reports No. 21, October 1953.) Centrifugal sugar production in the world during the crop year 1953-54 (i.e. the year ending in the spring or summer of 1954 before harvest of the 1954 Southern Hemisphere crop) is estimated at 36.2 million metric tons, raw value. This is about 10 percent more than production in 1952-53, 4 percent above 1951-52 and 40 percent above the pre-war (1935-39) average of 25.9 million tons.

World centrifugal sugar requirements during the current year are estimated at about 33.6 million metric tons or about 2.6 million tons less than production. Not all of this surplus enters international trade nor directly burdens the world free market.

Basic quotas assigned to participating countries amount to 4.6 million tons and through two actions of the Council have been reduced the maximum allowable amount of 20 percent and now total 3.7 million tons. Nonparticipating countries have an estimated supply available for export to the world free market of almost 1.0 million tons. These free market supplies for 1954 (4.7 million metric tons) are about 800 thousand tons larger than free market requirements (3.9 million metric tons.) The world free market acts as a kind of balance wheel for the world sugar economy. Only 13 percent of world centrifugal sugar production during the current crop year constitutes world free market supplies; but this market carries 800,000 tons of the 2.6 million ton surplus burden, that is, about 30 percent of the entire surplus.

Countries or areas participating in the agreement have quota allotments for export to the free market of 3.7 million tons and import requirements of about 1.5 million tons. Nonparticipating countries or areas to which the provisions of the agreement do not apply, have about 955 thousand tons available for export to the free market (trade estimates) and requirements of about 2.4 million tons (Tables 1, 2, and 3).

Table 1. "Supplies" and Requirements of Sugar - Estimated
Free Market 1954 1/

	<u>"Supplies"</u> <u>1,000 metric tons</u>	<u>Requirements</u> ^{2/} <u>1,000 metric tons</u>
Countries or areas participating in agreement	3,709 ^{3/}	1,478
Countries or areas not partici- pating in the agreement	955 ^{4/}	2,391
Minus adjustments (net)	-	5
Total	4,664	3,864

1/ For details see Tables 2 and 3.

2/ As estimated by the International Sugar Council at its May 1954 meeting.

3/ Quota in effect

4/ Estimates of C. Czarnikow, Ltd. (See Cazanikow Review No. 149, May 13, 1954)

Four fifths of available export supplies are held by participants in the Agreement. On the import side, however, participants' requirements are only 38 percent of total world free market requirements. All of the large world free market exporters except Peru and Indonesia participate in the Agreement; but India and also many

importing countries, each of which requires less than 200,000 metric tons of world free market sugar, have elected not to join the Agreement for the time being. It will be noted from Table 1, however, that even if nonparticipating importers would systematically seek nonparticipating exporters' sugar they would still have to obtain 1,436 thousand metric tons, or 60 percent of their requirements from exporting countries which are participants. This indispensability of participating exporters and the flexible terms of the Agreement offer a promise that the Agreement will be a stabilizing factor in the 1954 sugar market in spite of the surplus of approximately 800,000 metric tons of sugar, and in spite of the failure of many importing countries to join the Agreement.

It should be noted that "supplies" available from participating countries (3.7 million tons) represent export quota allotments and are not necessarily indicative of the total availability of sugar at present in those countries, individually or as a group. A question has been raised as to the possibility that some participating countries, due to lack of adequate supplies, may be unable to fill their present export quota allotments for 1954. The answer appears to be that even if such a situation should occur the tonnage of sugar available for the free market is unlikely to be decreased. Any participating country that is unable to fill its export quota is required to notify the Council by August and the latter agency within 10 days after such notification must reallocate the unfilled part to other participants. With an overall surplus of supplies any shortfall in exports from one or more participants could be filled from the backlog of surplus of other participants. Obviously if sufficient demand is lacking at prices within the range provided in the Agreement (3.25 to 4.35 cents per pound), no participating country is expected nor required to export its full quota, even though shortfalls have been declared and prorations made by the Council.

It will be to the advantage of each country, of course, to export to the limit of its quota if demand exists at prices within the price range. Recognizing the imbalance between world free market supplies and requirements, the International Sugar Council, at its May meeting, recommended that all its member exporting countries regulate their exports to the world market in an orderly manner and that such exports not exceed 75 percent (2,948 thousand tons) of their initial export quotas (3,931 thousand tons) during the first eight months of the present quota year. Two countries, Cuba and the Dominican Republic, which have about 60 percent (2,280 thousand tons) of the total quota now in effect (3,709 thousand tons) had already taken individual action to restrict exports to the free market more nearly in line with the effective demand. So far this year Cuba has released only 721 thousand tons of its quota of 1.8 million tons.

Termination of sugar rationing in the United Kingdom in the fall of 1953 and special arrangements for payment of Cuban sugar partly in the form of soft-currency credits enabled Cuba and the Dominican Republic to export substantial amounts of sugar mostly during 1953 but to some extent this year. Despite these arrangements, the worldwide trend towards greater self-sufficiency in sugar production operates

Table 2.- World free market supplies of sugar
Calendar year 1954

Country or area	Free market quota under international sugar agreement of 1953 1/		
	Basic	Initial 1954; by action of the council in December 1953	In effect 1954, by action of the council in May 1954
Those which have ratified, indicated their intention to ratify, or have acceded to agreement			
	Metric tons, raw value		
Belgium (including Belgian Congo)	50,000	42,500	40,000
Brazil	175,000	148,750	140,000
China (Taiwan)	600,000	510,000	480,000
Cuba	2,250,000	1,912,500	1,800,000
Czechoslovakia	275,000	233,750	220,000
Dominican Republic	600,000	510,000	480,000
France 2/	20,000	18,000	18,000
Haiti	45,000	40,500	40,500
Hungary	40,000	36,000	36,000
Mexico	75,000	63,750	60,000
Netherlands 3/	40,000	36,000	36,000
Philippines	25,000	22,500	22,500
Poland	220,000	187,000	176,000
U. S. S. R.	200,000	170,000	160,000
Subtotal	4,615,000	3,931,250	3,709,000
Those which have not ratified, nor indicated their intention to ratify, nor acceded to agreement 6/			
		Estimated Available for exports to free market 4/	
		Metric tons, raw value	
Columbia	5,000	20,000	5/
Denmark	70,000	70,000	
Germany, Eastern	150,000	150,000	
Indonesia	250,000	250,000	
Peru	280,000	385,000	
Spain	-	80,000	
Yugoslavia	20,000	-	
Subtotal	775,000	955,000	
Grand total	5,390,000	4,664,000	

1/ International Sugar Council. 2/ France and countries France represents internationally. 3/ Also includes Surinam. 4/ Estimates of C. Czarnikow, Ltd. (See Czarnikow Review No. 149, May 13, 1954. 5/Central and South American countries, except Peru. 6/Basic quotas initially assigned are not applicable because these countries are not now participating in the International Sugar Agreement of 1953.

Table 3.- World free market requirements of sugar
Calendar year 1954

Country or area	Free market requirements ^{1/}		Free market requirements ^{1/}
Those which have ratified, indicated their intention to ratify, or have acceded to agreement	1000 metric tons, raw value	Those which have not ratified, nor indicated their intention to ratify, nor acceded to agreement (cont.)	1000 metric tons, raw value
United Kingdom	212	Africa	
Germany (Western)	150	Egypt	60
Netherlands	40	Other Africa	50
Portugal & Overseas Provinces	30	Total Africa	110
Total Europe	432		
Japan	1,046	Asia and Oceania	
TOTAL PARTICIPATING	1,478	India	450
Those which have not ratified, nor indicated their intention to ratify, nor acceded to agreement		Pakistan	125
Europe		Burma	15
Austria	10	China (Mainland)	100
Finland	120	Korea	20
Greece	110	Siam	20
Iceland	6	Afghanistan	20
Irish Republic	70	Arabia and Neighboring Red Sea Territories	60
Norway	135	Iran	170
Rumania	16	Iraq	130
Sweden	15	Israel	45
Switzerland	183	Jordan	12
Trieste	5	Syria	40
Total Europe	670	Lebanon	35
America		Polynesia, Oceania, Micronesia	5
Bolivia	45	Total Asia and Oceania	1,247
Chile	180	TOTAL NON-PARTICIPATING	2,391
Guatemala	7		
Honduras	9	WORLD TOTAL	3,869
Panama (Canal Zone)	4	Less adjustment on figures when 9:10 conversion rate is inappropriate	55
Paraguay	5		3,814
Salvador	4	Plus Non-Statistical Consumption	50
Uruguay	80		
Venezuela	30	ESTIMATED TOTAL WORLD REQUIREMENTS OF FREE MARKETS	3,864
Total America	364		

^{1/}As estimated by the International Sugar Council at its May 1954 meeting.

to the detriment of these two countries. The British Commonwealth Sugar Agreement aims at greater sugar self-sufficiency and most important sugar producing countries and areas of the Commonwealth report substantial increases in production during the current year. Most countries on the European Continent are increasing their production. Many nations in the area of the Eastern Mediterranean are about to establish sugarcane or sugar beet culture. In the Far East, Indonesia is making further progress with the rehabilitation of its sugar industry.

Despite the trend toward self-sufficiency in sugar production, the downward trend in sugar prices has been arrested at least for the present. World sugar prices averaged 4.64 cents per pound for the five years 1948-52, and 3.41 cents per pound for 1953. From an average of 3.55 in January the price seasawed until November when it reached a monthly low (3.10 cents) for the year. Since the Agreement became effective in January 1954 the weekly average world price of sugar has ranged between 3.25 cents (weeks of January 8 and March 26) and 3.41 cents (week of February 5) per pound, at or near the bottom of the price range prescribed in the Agreement as being equitable both to consumers and producers. The world price on June 15, 3.30 cents, was only .05 cent above the bottom of the range.

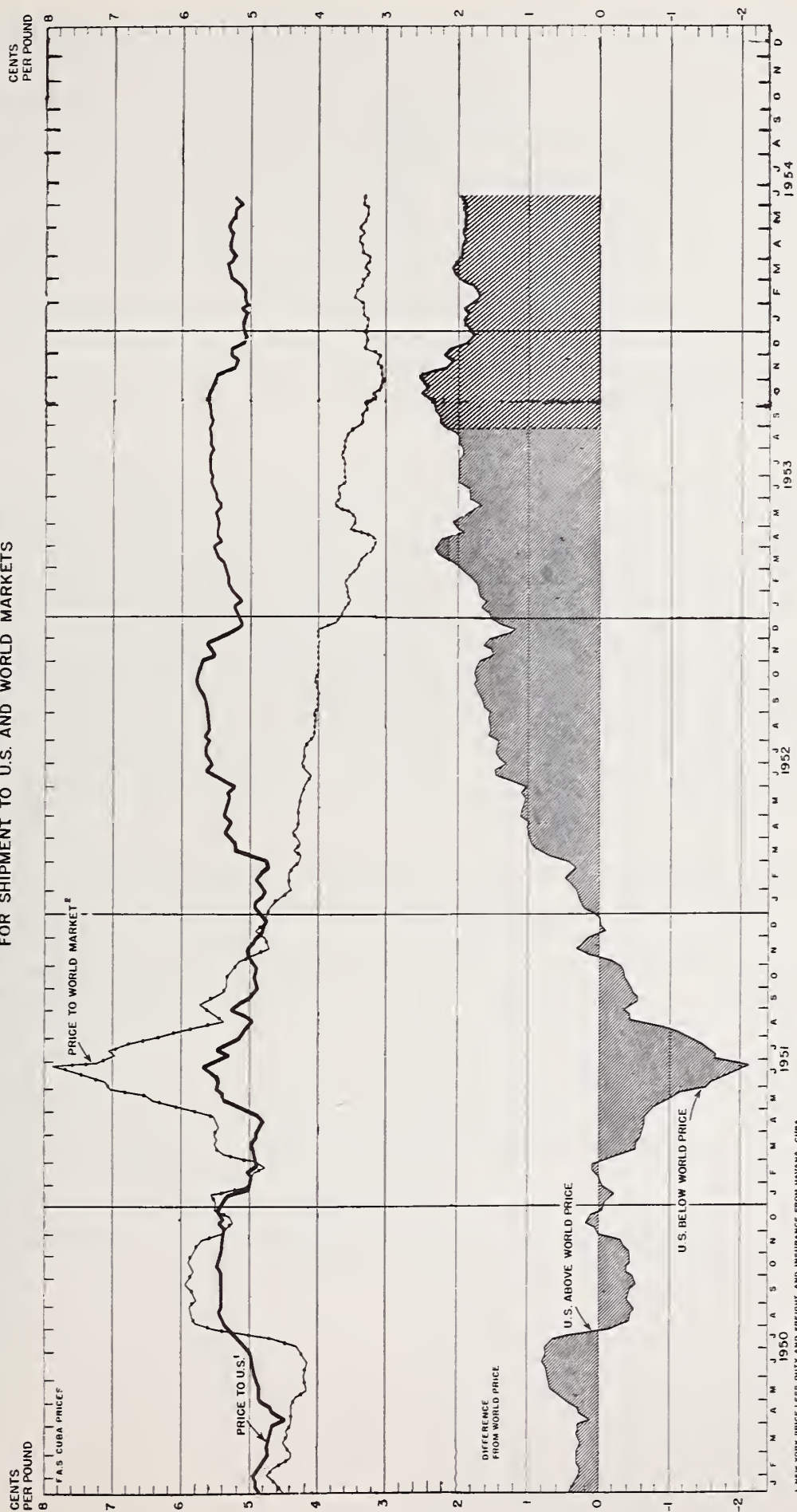
Since last January the spread between the United States and the world price of raw sugar has ranged between 1.72 cents and 2.08 cents per pound. For week ended June 11, 1954 it was 2.00 cents.

MEETING RELATING TO ACREAGE RESTRICTIONS FOR THE 1955 SUGAR BEET CROP

A meeting is being held June 22, 1954 in the Jefferson Auditorium of the Department of Agriculture, Washington, D. C. for the purpose of discussing means by which excessive production can be avoided for the next crop of sugar beets. Representatives of processors and growers have been invited to attend in order that all interested parties may present their views.

Early indications were that 1953 crop beet sugar production would be considerably less than the statutory quota of 1,800,000 short tons, raw value, but it now appears that final production will be about 1,900,000 tons. This unexpectedly large production resulted in an effective inventory (stocks on January 1 plus processings thereafter of prior crop beets) of 1,440,000 tons at the beginning of 1954. It also led to the imposition of marketing allotments in the beet sugar area for the calendar year 1954 to prevent disorderly marketing and to afford an equitable opportunity to all interested parties to market sugar within the quota. At the same time, processors and growers were

RAW SUGAR QUOTA PREMIUMS AND DISCOUNTS WEEKLY COMPARISON, F.A.S. CUBA PRICES OF RAW SUGAR FOR SHIPMENT TO U.S. AND WORLD MARKETS



1. NEW YORK PRICE LESS DUTY AND FREIGHT AND INSURANCE FROM HAVANA, CUBA
2. F.A.S. HAVANA, CUBA

cautioned against over production and encouraged to keep production within reasonable bounds. Indicated acreage in 1954 shows a substantial cut below early prospects, but with average yields per acre and the carryover at the beginning of the year, marketing allotments will be imperative in 1955 and effective control of the sugar beet acreage will be needed. The immediate problem for consideration at the meeting is acreage control, either through grower-processor cooperation or by Government regulation. In a letter to all beet sugar processors dated April 19, 1954, Under Secretary True D. Morse acknowledged the efforts that were being made to curtail plantings for the 1954 crop and reiterated the Department's desire to avoid a Governmental program of crop restriction if adjustments could be made on the basis of grower-processor cooperation.

At the time Under Secretary Morse's letter was released it appeared that plantings would be up as much as 19 percent from the previous year. However, recent reports received from processors indicate that 1954 plantings (951,000 acres under the Sugar Act concept) will be only 15 percent higher than for the 1953 crop. On the basis of average yields per planted acre for the last three years sugar production would be in excess of 2,000,000 short tons, raw value. With an effective inventory at the beginning of 1954 of 1,440,000 tons and marketings in 1954 limited to the quota of 1,800,000 tons, a crop in excess of two million tons would result in an effective inventory on January 1, 1955, of at least 1,650,000 short tons, raw value.

The voluntary restriction of 1954 production suggests the possibility that effective controls could be obtained for future crops by a cooperative effort of sugar beet growers and processors. However, it is necessary that early consideration be given to equitable methods of preventing excessive production from the next crop in order that such methods be made operative promptly as a means of maintaining a stable domestic sugar beet industry. Consistent with its efforts to impose a minimum of controls, the Department believes that the industry can meet this problem in a practical manner without having introduced the rigidities inherent in a Governmental program. In the absence of an acceptable voluntary program, it may be necessary for the Department to curtail production through restrictive proportionate shares to growers in accordance with Section 302 of the Sugar Act.

SUGAR ACT OF 1948 -- ADMINISTRATIVE ACTIONSDate announcedAdministrative Action

May 26, 1954

Establishment of "fair and reasonable prices" for the 1954 crop of Hawaiian sugarcane mostly at the prices provided in sugarcane purchase contracts entered into between processors and producers. Exceptions are as follows: A minimum pricing factor has been specified for sugarcane purchased by three processors under adherent planter contracts because such contracts have been in arbitration for several years; in the case of sugarcane purchased by one processor who submitted a proposed independent grower contract at the public hearing in Hilo, Hawaii, in October 1953, which had not been negotiated with the growers, a pricing factor has been established higher than that recommended by the processor. Under most purchase contracts the price of sugarcane is dependent upon net returns from sugar and molasses and the quality of sugarcane delivered. The terms of the determination will not significantly alter the sharing relationship between processors and producers for the 1954 crop as compared with the 1953 crop.

May 28, 1954
(by letter to sugar
beet processors and
sugar beet grower
associations)

Informal meeting of officials of the U.S. Department of Agriculture with producers and processors of sugar beets to be held June 22 in Washington, D.C. to discuss method by which excessive production can be avoided for 1955 crop of sugar beets.

June 2, 1954

Public hearing regarding allotment of 1954 quota for domestic beet sugar area, originally held in Chicago, Illinois on January 18-20, 1954, to be reopened at Jefferson Auditorium, U.S. Department of Agriculture, Washington, D.C. on June 24, 1954 at 10:00 A.M., E.S.T. In view of the exceptions filed in connection with the recommended decision and order announced by the Administrator, Commodity Stabilization Service, on April 5, the hearing is being reopened to receive further oral argument.

Date announcedAdministrative action

June 9, 1954

Informal hearing regarding establishment of farm proportionate shares for the 1955 sugarcane crop in the Mainland Sugarcane Area to be held on July 8, 1954 (10:00 A.M. CST), in New Orleans, La. The Department announced that in view of the production of 607 thousand and 630 thousand short tons, raw value, of sugar, from the 1952 and 1953 sugarcane crops, respectively, and the fact that production from the 1954 crop may slightly exceed the quota of 500 thousand tons, restrictions must be continued for the 1955 crop in order to keep sugar production in the area in line with the quota and carryover requirements.

STATISTICAL SERIES IN THIS ISSUEHIGHLIGHTS

1. Deliveries of sugar by primary distributors for U. S. consumption during May were 637 thousand tons, 38 thousand tons, or 6 percent, larger than May, 1953; deliveries during first five months were 3,079 thousand tons, 116 thousand tons, or 4 percent, less than same period of 1953.
2. Stocks held by primary distributors on June 5 were 217 thousand tons, or 15 percent, larger than on May 31, 1953; stocks of each group of distributors were larger this year.
3. During January-March, 1954 the percentages of National deliveries by primary distributors to California, Illinois, and Missouri were 1.2, 0.7 and 0.5 percentage points, respectively, less than deliveries to those states during the first quarter of 1953. The largest percentage increase, 0.6 percentage points, was in deliveries to Maine. Changes to all other states were less than 0.5 percentage points.

Deliveries by beet sugar processors for the first quarter increased from 17.4 percent of total sugar deliveries in 1953 to 18.7 percent in 1954; the largest increase in the totals by areas, of beet sugar deliveries occurred in the East North Central states. Refiners' deliveries increased from 73.7 to 74.2 percent of the National total; most of the increase in deliveries of cane sugar occurred in the East. Importers' percentage dropped 1.8 percentage points (6.8 to 5.0 percent) and that for mainland cane mills remained the same at 2.1 percent of the National total.

4. Charges against quotas for the first five months of 1954 totaled 35 thousand tons, or 0.9 percent less than during the comparable period of 1953; charges against the quotas were smaller for all areas except domestic beet, the Philippines and Cuba. Charges against quotas during first eleven days of June amounted to 306 thousand tons. Balance within direct-consumption limitation of quota for "full-duty" countries exhausted.
5. Revisions have been made (See Table 12) in data of importers' stocks, receipts and deliveries for January-March since preparation of Sugar Reports No. 25.

Table 4 .- Distribution of sugar by primary distributors in the continental United States, Puerto Rico, and Hawaii during January-April 1954 and 1953

	<u>1954</u> (Short tons, raw value)	<u>1953</u> (Short tons, raw value)
<u>Continental United States</u>		
Refiners' raw sugar	448	832
Refiners' refined sugar	1,786,289	1,864,540
Beet sugar processors	480,067	493,445
Importers' direct-consumption sugar	139,692	192,279
Mainland cane mills direct-consumption sugar	<u>45,964</u>	<u>51,469</u>
Total	2,452,460	2,602,565
Deliveries for non-quota purposes	10,024	6,365
For continental consumption*	2,442,436	2,596,200
<u>Puerto Rico</u>	30,039	30,197
<u>Hawaii</u>	13,059	16,422

* Includes deliveries for United States military forces at home and abroad.

Table 5 .- Stocks of sugar held by primary distributors in the continental United States, April 30, 1954 and 1953

	<u>1954</u> (Short tons, raw value)	<u>1953</u> (Short tons, raw value)
Refiners' raw	327,013	244,882
Refiners' refined	294,806	311,356
Beet sugar processors	814,349	718,149
Importers' direct-consumption sugar	68,116	59,020
Mainland cane mills	<u>121,007</u>	<u>19,493</u>
Total	1,625,291	1,352,900

Table 6.-Raw sugar: Refiners' stocks, receipts and meltings,
January - April 1954

Source of supply	Stocks : Jan. 1, : 1954	: : Receipts	: : Meltings	: Deliveries : for direct : consumption	: Stocks : April 30, : 1954
(Short tons, raw value)					
Continental raws (see "Mainland cane")					
Cuba	17,905	1,069,485	931,288	120	155,982
Hawaii	59,041	232,384	235,955	0	55,470
Mainland cane	67,819	108,989	165,749	120	10,939
Philippines	29,250	323,738	303,167	71	49,750
Puerto Rico	13,414	267,846	226,251	137	54,872
Virgin Islands	0	2,259	2,259	0	0
Other countries	512	2,467	2,979	0	0
Miscellaneous	-	31	31	0	0
Total	187,941	2,007,199	1,867,679	448	327,013

Source: Compiled from reports submitted on Form SU-15A by cane sugar refiners.

Table 7.-Refined sugar: Refiners' and processors' stocks, production and deliveries, January-April 1954

	Cane sugar (Short tons, raw value)	Beet sugar
Stocks January 1, 1954	217,064	1,125,256
Production	1,863,930	169,451
Received from other primary distributors	2,554	1,792
Deliveries for consumption and export	1,786,289	480,067
Deliveries to other primary distributors	2,453	2,083
Stocks April 30, 1954	294,806	814,349

Source: Compiled from reports submitted on Form SU-16A and SU-11C by cane sugar refiners and beet sugar processors.

Table 8.-Direct-consumption sugar: Importers' stocks, receipts and deliveries January-April 1954

	: Stocks Jan.1, :	:	:	: Stocks April 30,
Source of supply :	1954	: Receipts :	Deliveries :	1954
	(Short tons, raw value)			
Cuba	2,780	137,090	90,165	49,705
Hawaii	2,194	5,667	6,241	1,620
Philippines	322	770	1,090	2
Puerto Rico	=	34,662	25,884	8,778
Other countries	6,076	18,247	16,312	8,011
Total	11,372	196,436	139,692	68,116

Source: Compiled from reports on Form SU-15B submitted by importers of direct-consumption sugar.

Table 9 .- Mainland sugarcane mills' stocks, production and deliveries of sugar - January-April, 1954.

	(Short tons, raw value)
Stocks January 1, 1954	143,549
Production	104,637
Deliveries	
For further processing	81,215 ^{1/}
For direct-consumption	45,964 ^{2/}
Total	127,179
Stocks April 30, 1954	121,007

Source: Compiled from reports submitted by mainland sugarcane processor-refiners.

^{1/} January - March revised - 68,269.

^{2/} January - March revised - 39,392.

Table 10.- Distribution of sugar by primary distributors in the continental United States, May and January-May, 1954 and 1953.

	1954 ^{1/}		1953	
	May	Jan.-May (Short tons, raw value)	May	Jan.-May
Refiners	430,644	2,217,381	431,943	2,297,315
Beet processors	152,844	632,911	107,596	601,041
Importers	53,774	193,466	57,636	249,915
Mainland sugarcane mills	1,528	47,492	3,661	55,130
Total	638,790	3,091,250	600,836	3,203,401
Deliveries for non-quota purposes	2,070	12,094	1,981	8,346
For continental consumption ^{2/}	636,720	3,079,156	598,855	3,195,055

^{1/} Preliminary.

^{2/} Includes deliveries for U. S. military forces at home and abroad.

Table 11.- Stocks of sugar held by primary distributors in the continental United States, June 5, 1954 and May 31, 1953.

	June 5, 1954 ^{1/} (Short tons, raw value)	May 31, 1953
Refiners' raw	393,404	310,429
Refiners' refined	347,466	377,991
Beet sugar processors	675,912	637,112
Importers' direct-consumption sugar	94,182	74,582
Mainland sugarcane mills	<u>121,007 ^{2/}</u>	<u>14,456</u>
Total	1,631,971	1,414,570

^{1/} Preliminary.^{2/} Not available; estimated same as April 30, 1954.

Table 12.- Direct-consumption sugar: Importers' stocks, receipts and deliveries - January - March 1954 (revised).

Source of supply	Stocks January 1, 1954	Receipts	Deliveries	Stocks March 31, 1954
(Short tons, raw value)				
Cuba	2,780	100,833	64,090	39,523
Hawaii	2,194	3,111	3,856	1,449
Philippines	322	316	600	38
Puerto Rico	-	20,747	15,114	5,633
Other countries	<u>6,076</u>	<u>11,323</u>	<u>9,894</u>	<u>7,505</u>
Total	11,372	136,330	93,554	54,148

Source: Compiled from reports on Form SU-15b submitted by importers of direct-consumption sugar.

Table 13. - Deliveries of sugar by primary distributors by states
First Quarter 1954

State	Cane sugar refin- eries	Beet sugar pro- cessors	Importers of direct- consump- tion sugar	Main- land cane mills	Total
100 pound bags, refined equivalent					
ALABAMA	483371			26734	510105
ARIZONA	66274	38539			104813
ARKANSAS	264197	7000		10043	281240
CALIFORNIA	1341104	1386944	16313		2744361
COLORADO	21613	202767	144		224524
CONNECTICUT	314354		4530	15	318899
DELAWARE	35280				35280
DISTRICT OF COLUMBIA	147106		3900		151006
FLORIDA	312605		243013	118992	674610
GEORGIA	1164539		143553		1308092
IDAHO	11280	50202			61482
ILLINOIS	1327104	1136857	49375	227004	2740340
INDIANA	784959	140091		47283	972333
IOWA	169747	311290	4000	606	485643
KANSAS	93546	179996		396	273938
KENTUCKY	461015	1000	8927	30280	501222
LOUISIANA	843821			61170	904991
MAINE	176591				176591
MARYLAND	716589		69970		786559
MASSACHUSETTS	1245793		18663		1264456
MICHIGAN	577894	615236	2287	48140	1243557
MINNESOTA	104821	391012		607	496440
MISSISSIPPI	333050			25473	358523
MISSOURI	557741	179691	2400	8214	748046
MONTANA	4782	69303			74085
NEBRASKA	41688	316417		1216	359321
NEVADA	12072	4788			16860
NEW HAMPSHIRE	77987				77987
NEW JERSEY	1618054		14591		1632645
NEW MEXICO	27669	54072	200		81941
NEW YORK	3881310	120001	354171		4355482
NORTH CAROLINA	648884		168282		817166
NORTH DAKOTA	8188	75605			83793
OHIO	1521181	110579	36150	50277	1718187
OKLAHOMA	250054	103124		2415	355593
OREGON	97519	106430	38163	563	242678
PENNSYLVANIA	2337698	23000	335813	25	2696536
RHODE ISLAND	149751		800		150551
SOUTH CAROLINA	400436		3354		403790
SOUTH DAKOTA	6450	81726			88176
TENNESSEE	680918		2887	38100	721905
TEXAS	1469505	222014	20172	20980	1732671
UTAH	12817	97400			110217
VERMONT	62696		15439		78135
VIRGINIA	535484		153150		688634
WASHINGTON	123121	227880	34718		385719
WEST VIRGINIA	243226	3000	6850		253076
WISCONSIN	291321	268883		34687	594891
WYOMING	2712	31636			34348
	26059917	6556483	1751815	753220	35121435

Table 13 .- Deliveries of sugar by primary distributors by states

January 1954

State	Cane sugar refin- eries	Beet sugar pro- cessors	Importers of direct- consump- tion sugar	Main- land cane mills	Total
100 pound bags, refined equivalent					
ALABAMA	140189			8789	148978
ARIZONA	18295	11483			29778
ARKANSAS	72228			5874	78102
CALIFORNIA	421724	404433	9776		835933
COLORADO	6161	60653	96		66910
CONNECTICUT	81613			15	81628
DELAWARE	10798				10798
DISTRICT OF COLUMBIA	32649				32649
FLORIDA	114481		39026	66480	219987
GEORGIA	327731		1080		328811
IDAHO	3441	15916			19357
ILLINOIS	291495	268790		68155	628440
INDIANA	236222	35330		14798	286350
IOWA	46330	64951	1000	606	112887
KANSAS	26108	38790		396	65294
KENTUCKY	107125		2780	9397	119302
LOUISIANA	223692			23672	247364
MAINE	48894				48894
MARYLAND	202501		5840		208341
MASSACHUSETTS	356983		294		357277
MICHIGAN	143579	163413	100	7540	314632
MINNESOTA	28041	84602		607	113250
MISSISSIPPI	90935			11453	102388
MISSOURI	169412	24165	800	6936	201313
MONTANA	833	18908			19741
NEBRASKA	8375	79219		303	87897
NEVADA	4489	1470			5959
NEW HAMPSHIRE	20801				20801
NEW JERSEY	437732		2035		439767
NEW MEXICO	7917	13255			21172
NEW YORK	1034589	52200	50581		1137370
NORTH CAROLINA	220298		10246		230544
NORTH DAKOTA	1694	17098			18792
OHIO	365048	30899	24	20309	416280
OKLAHOMA	70385	31266		1615	103266
OREGON	34030	27027	7321		68378
PENNSYLVANIA	573638	10000	53396	25	637059
RHODE ISLAND	44302				44302
SOUTH CAROLINA	114114				114114
SOUTH DAKOTA	1405	17879			19284
TENNESSEE	189064			14713	203777
TEXAS	462688	62492		17218	542398
UTAH	4554	30952			35506
VERMONT	19302		1960		21262
VIRGINIA	153981		31951		185932
WASHINGTON	48784	66259	7443		122486
WEST VIRGINIA	57835	1000	1225		60060
WISCONSIN	83769	72589		8328	164686
WYOMING	1091	9956			11047
	7161345	714995	226974	287229	9390543

Table 13. - Deliveries of sugar by primary distributors by states

February 1954

State	Cane sugar refin- eries	Beet sugar pro- cessors	Importers	Main- land cane mills	Total
			of direct- consump- tion sugar		
100 pound bags, refined equivalent					
ALABAMA	150982			8209	159191
ARIZONA	25327	12504			37831
ARKANSAS	86231			2928	89159
CALIFORNIA	391834	384681	342		776857
COLORADO	6787	65347			72134
CONNECTICUT	86550		1820		88370
DELAWARE	9594				9594
DISTRICT OF COLUMBIA	40899		1500		42399
FLORIDA	96149		94991	23317	214457
GEORGIA	399249		26568		425817
IDAHO	3644	15022			18666
ILLINOIS	487310	311198		86998	885506
INDIANA	244553	43861		10753	299167
IOWA	55036	103610			158646
KANSAS	32148	58993			91141
KENTUCKY	153837	1000	6147	5883	166867
LOUISIANA	262427			15183	277610
MAINE	45163				45163
MARYLAND	204318		9980		214298
MASSACHUSETTS	339552		9290		348842
MICHIGAN	135331	153429	1293	21000	311053
MINNESOTA	37626	108559			146185
MISSISSIPPI	113663			6260	119923
MISSOURI	182566	56266		340	239172
MONTANA	2107	20733			22840
NEBRASKA	11657	93194		594	105445
NEVADA	3498	776			4274
NEW HAMPSHIRE	20975				20975
NEW JERSEY	452053		5000		457053
NEW MEXICO	7439	14041	200		21680
NEW YORK	1082173	23001	127592		1232766
NORTH CAROLINA	215644		78017		293661
NORTH DAKOTA	2401	21273			23674
OHIO	441440	27873	8926	10629	488868
OKLAHOMA	78525	26982			105507
OREGON	29305	34079	12792		76176
PENNSYLVANIA	662622	9000	76631		748253
RHODE ISLAND	43832		600		44432
SOUTH CAROLINA	122689		1585		124274
SOUTH DAKOTA	2235	27918			30153
TENNESSEE	238211		250	11290	249751
TEXAS	376402	61339	109	2047	439897
UTAH	3672	28300			31972
VERMONT	13323		7000		20323
VIRGINIA	158784		39973		198757
WASHINGTON	39429	81784	8901		130114
WEST VIRGINIA	67942		1200		69142
WISCONSIN	95110	89249		18985	203344
WYOMING	620	8401			9021
	7762864	1882413	520707	224416	10390400

Table 13. - Deliveries of sugar by primary distributors by states
March 1954

State	Cane sugar refin- eries	Beet sugar pro- cessors	Importers of direct- consump- tion sugar	Main- land cane mills	Total
100 pound bags, refined equivalent					
ALABAMA	192200			9736	201936
ARIZONA	22652	14552			37204
ARKANSAS	105738	7000		1241	113979
CALIFORNIA	527546	597830	6195		1131571
COLORADO	8665	76767	48		85480
CONNECTICUT	146191		2710		148901
DELAWARE	14888				14888
DISTRICT OF COLUMBIA	73558		2400		75958
FLORIDA	101975		108996	29195	240166
GEORGIA	437559		115905		553464
IDAHO	4175	19264			23439
ILLINOIS	548299	556869	49375	71851	1226394
INDIANA	304184	60900		21732	386816
IOWA	68381	142729	3000		214110
KANSAS	35290	82213			117503
KENTUCKY	200053			15000	215053
LOUISIANA	357702			22315	380017
MAINE	82534				82534
MARYLAND	309770		54150		363920
MASSACHUSETTS	549258		9079		558337
MICHIGAN	298984	298394	894	19600	617872
MINNESOTA	39154	197851			237005
MISSISSIPPI	128452			7760	136212
MISSOURI	205763	99260	1600	938	307561
MONTANA	1842	29662			31504
NEBRASKA	21656	144004		319	165979
NEVADA	4085	2542			6627
NEW HAMPSHIRE	36211				36211
NEW JERSEY	728269		7556		735825
NEW MEXICO	12313	26776			39089
NEW YORK	1764548	44800	175998		1985346
NORTH CAROLINA	212942		80019		292961
NORTH DAKOTA	4093	37234			41327
OHIO	714693	51807	27200	19339	813039
OKLAHOMA	101144	44876		800	146820
OREGON	34184	45324	18050	563	98121
PENNSYLVANIA	1101438	4000	205786		1311224
RHODE ISLAND	61617		200		61817
SOUTH CAROLINA	163633		1769		165402
SOUTH DAKOTA	2810	35929			38739
TENNESSEE	253643		2637	12097	268377
TEXAS	630415	98183	20063	1715	750376
UTAH	4591	38148			42739
VERMONT	30071		6479		36550
VIRGINIA	222719		81226		303945
WASHINGTON	34908	79837	18374		133119
WEST VIRGINIA	117449	2000	4425		123874
WISCONSIN	112442	107045		7374	226861
WYOMING	1001	13279			14280
	11135708	2959075	1004134	241575	15340492

Table 13. - Deliveries of sugar by primary distributors by states
April 1954

State	Cane sugar refin- eries	Beet sugar pro- cessors	Importers of direct- consump- tion sugar	Main- land cane mills	Total
100 pound bage, refined equivalent					
ALABAMA	192204			7669	199873
ARIZONA	19711	14427			34138
ARKANSAS	97183	8000		1692	106875
CALIFORNIA	459216	502607	22402		984225
COLORADO	10053	93671	22751		126475
CONNECTICUT	57922		6450		64372
DELAWARE	11292				11292
DISTRICT OF COLUMBIA	40125		3400		43525
FLORIDA	86228		70454	3590	160272
GEORGIA	334671		16457		351128
IDaho	3683	17762			21445
ILLINOIS	475421	506035	1440	28719	1011615
INDIANA	236880	65512	14235	6478	323108
IOWA	70213	106319	3600	604	180736
KANSAS	30134	76075			106209
KENTUCKY	148904		8851	7168	164923
LOUISIANA	278423			23149	301572
MAINE	32819				32819
MARYLAND	179539		20890		200429
MASSACHUSETTS	303670		7958		311628
MICHIGAN	54735	125851	28552	810	209948
MINNESOTA	41516	110822			152338
MISSISSIPPI	112740			5917	118657
MISSOURI	209256	93205	2400		304861
MONTANA	1403	24329			25732
NEBRASKA	19932	123283		301	143516
NEVADA	3447	1805			5252
NEW HAMPSHIRE	23406				23406
NEW JERSEY	415165		16842		432007
NEW MEXICO	3209	12078			15287
NEW YORK	1011801	14000	159633		1185434
NORTH CAROLINA	196101		81076		277177
NORTH DAKOTA	1628	19550			21178
OHIO	331183	32359	25441	21324	410307
OKLAHOMA	84174	33137			117311
OREGON	20960	44583	4993		70536
PENNSYLVANIA	498459	1000	241727	25	741211
RHODE ISLAND	35526		200		35726
SOUTH CAROLINA	81913		9685		91598
SOUTH DAKOTA	2040	26441			28481
TENNESSEE	230745		3017	16439	250201
TEXAS	397554	117275	19999	18	534846
UTAH	6543	42500			49043
VERMONT	10444		5770		16214
VIRGINIA	99917		79259		179176
WASHINGTON	37209	90673	4243		132125
WEST VIRGINIA	45843		6602		52445
WISCONSIN	117904	93068		2086	213058
WYOMING	1132	12969			14101
	7164176	2409336	888327	125989	10587828

Table 14 .- Status of 1954 sugar quotas as of May 31, 1954

Area	Quota	Credit for drawback of duty	Charge to quota and offset to drawback of duty	Unfilled balance	
				Total	Within direct consumption limits for off- shore areas
<u>short tons, raw value</u>					
Domestic beet	1,800,000	-	630,081	1,169,919	-
Mainland cane	500,000	-	182,335 <u>1/</u>	317,665	-
Hawaii	1,052,000	-	301,550	750,450	17,980
Puerto Rico	1,080,000	-	476,508	603,492	70,093
Virgin Islands	12,000	-	2,255	9,745	0
Republic of the Philippines	974,000	-	421,996	552,004	56,417
Cuba	2,670,720	2,015	1,496,703	1,176,032	193,807
Other foreign countries (see below)	<u>111,280</u>	<u>801</u>	<u>32,354</u>	<u>79,727</u>	<u>7,950</u>
Total	8,200,000	2,816	3,543,782	4,659,034	-
Foreign countries other than Cuba and Republic of the Philippines					
Dominican Republic	27,634	284	7,835	20,083	7,950
El Salvador	4,140	0	0	4,140	
Haiti	2,674	9	2,457	226	
Mexico	11,458	110	8,313	3,255	
Nicaragua	7,832	0	5,057	2,775	
Peru	51,978	398	3,130	49,246	
Unspecified countries (those without indi- vidual prorations)	<u>5,564</u>	<u>0</u>	<u>5,562 <u>2/</u></u>	<u>2 <u>3/</u></u>	
Total	111,280	801	32,354	79,727	

Liquid Sugar ^{4/}Wine gallons of 72 percent total sugar
content

Cuba	7,970,558	-	4,131,661	3,838,897
Dominican Republic	830,894	-	-	830,894
British West Indies	300,000	-	-	300,000

^{1/} May estimated same as May 1953.^{2/} Belgium 337; China (Formosa), 1,040; Canada, 995; Costa Rica, 1,036; Hong Kong, 4; Netherlands, 1,037; Panama, 1,113;^{3/} Applications being held awaiting availability of quota comprise (short tons, raw value): Belgium, 243; Canada, 214; China (Formosa), 1,185; Costa Rica, 1,354; Denmark, 1,164; Hong Kong, 5; Netherlands, 974; Panama, 1,057; total, 6,196.^{4/} 900 gallons entered under Section 212 by United Kingdom.

Table 15.- Comparison of charges to quotas and offsets to drawback of duty
January - May 1953 and 1954
(Short tons, raw value and percentage)

Area	1953	1954	Increases 1953 to 1954		Decreases 1953 to 1954	
	Tons	Tons	Tons	Percent	Tons	Percent
Domestic beet	613,133	630,081	16,948	2.8	-	-
Mainland cane	184,815	182,335 ^{2/}	-	-	2,480	1.3
Hawaii	411,524	301,550	-	-	109,974	26.7
Puerto Rico	558,032	476,508	-	-	81,524	14.6
Virgin Islands	4,560	2,255	-	-	2,305	50.5
Republic of the Philippines	363,537	421,996	58,459	16.1	-	-
Cuba	1,393,729	1,496,703	102,974	7.4	-	-
Other foreign countries (see below)	49,722	32,354	-	-	17,368	34.9
Total	3,579,052	3,543,782	-	-	35,270 ^{3/}	0.9 ^{3/}
Foreign countries other than Cuba and Republic of the Philippines						
Dominican Republic	10,498	7,835	-	-	2,663	25.4
El Salvador	0	0	-	-	0	-
Haiti	2,280	2,457	177	7.8	-	-
Mexico	10,256	8,313	-	-	1,943	18.9
Nicaragua	6,946	5,057	-	-	1,889	27.2
Peru	14,761	3,130	-	-	11,631	78.8
Unspecified countries (those without individual prorations)	4,981	5,562	581	11.7	-	-
Total	49,722	32,354	-	-	17,368 ^{3/}	34.9 ^{3/}

Liquid Sugar

Wine gallons of 72 percent total sugar content			
Cuba	5,500,058	4,131,661	1,368,397 24.9
Dominican Republic	11,804	-	11,804 -
British West Indies	0	0	- -

^{1/} Revised

^{2/} May estimated same as May 1953.

^{3/} Net decrease.

Table 16 .- Status of 1954 sugar quotas as of June 11, 1954

Area	Quota	Credit for drawback of duty	Charge to quota and offset to drawback of duty	Unfilled balance	
				Total	Within direct consumption limits for off- shore areas
short tons, raw value					
Domestic beet	1,800,000	-	687,255 1/	1,112,745	-
Mainland cane	500,000	-	196,135 2/	303,865	-
Hawaii	1,052,000	-	319,986	732,014	17,368
Puerto Rico	1,080,000	-	516,527	563,473	56,468
Virgin Islands	12,000	-	2,255	9,745	0
Republic of the Philippines	974,000	-	517,625	456,375	56,325
Cuba	2,670,720	2,015	1,570,197	1,102,538	158,762
Other foreign countries (see below)	111,280	801	40,304	71,777	0
Total	8,200,000	2,816	3,850,284	4,352,532	-
Foreign countries other than Cuba and Republic of the Philippines					
Dominican Republic	27,634	284	9,440	18,478)	
El Salvador	4,140	0	0	4,140)	
Haiti	2,674	9	2,457	226)	
Mexico	11,458	110	10,819	749)	0
Nicaragua	7,832	0	7,824	8)	
Peru	51,978	398	4,200	48,176)	
Unspecified countries (those without indi- vidual prorations)	5,564	0	5,564 3/	0 4/	
Total	111,280	801	40,304	71,777	

Liquid Sugar 5/

Wine gallons of 72 percent total sugar content				
Cuba	7,970,558	-	4,482,772	3,487,786
Dominican Republic	830,894	-	-	830,894
British West Indies	300,000	-	-	300,000

1/ Preliminary.

2/ May-June 11, estimated.

3/ Belgium, 337; China (Formosa), 1,040; Canada, 995; Costa Rica, 1,036; Hong Kong, 6; Netherlands, 1,037; Panama, 1,113.

4/ Applications being held awaiting availability of quota comprise (short tons, raw value): Belgium, 243; Canada, 214; China (Formosa), 1,185; Costa Rica, 1,354; Denmark, 1,164; Hong Kong, 3; Netherlands, 974; Panama, 1,057; total, 6,194.

5/ 900 gallons entered under Section 212 by United Kingdom.

